WORKDAY FOR MANAGERS

PERFORMANCE

Check-Ins

CHECK-INS

Check-ins provide an informal work review between managers and workers. Check-ins require less setup than a formal worker review and feedback event. You can launch a check-in on both your desktop and the Workday mobile app.

A check-in requires two participants: the user who creates the check-in and the user who receives the check-in. Both workers and managers can initiate a check-in.

Security Note: You can also set up check-ins so workers secured to the Self-Service: Check-Ins domain can send and receive check-ins to other workers secured to that domain, not just their managers.

CREATE A CHECK-IN

Participants can create unlimited check-ins as long as each check-in has a unique date. Check-in dates can be in the past or in the future, providing flexibility to document past meetings or plan for future ones. Participants can change the date at any time.

You can create only one check-in for a given date between two participants. For example, if you are a manager, you can create one check-in per date between you and each of your workers.

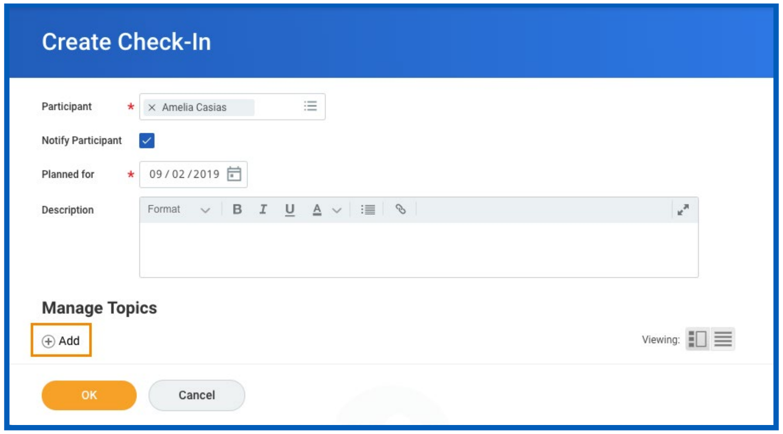
If you are a worker, you can create one check-in per date between you and your manager. If you are a manager, you can access the View Check-Ins report to view the Check-Ins for your workers.

1. From the Search menu, navigate to the My Check-Ins report. Click **Create Check-In**. Once you have created a check-in, the options to Edit or Delete this check-in is available to you from the same report. If someone else has initiated a check-in, these options are not available. You can also Archive all existing Check-Ins or topics from this task.
2. Select the Participant you would like to have your check-in with. This field is required.
3. (Optional) Select the **Notify Participant** checkbox. Workday will send a notification when you finish creating the check-in.

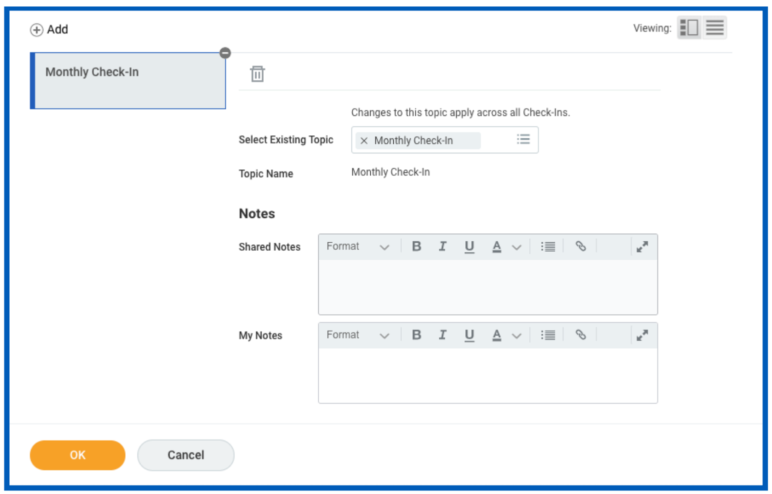
Note: Workday allows participants to select the Notify Participant checkbox when they create, edit, or delete check-ins or topics. This option quickly notifies other participants about new check-ins or changes.

Your Workday administrator can enable this function.

4. Specify a Planned for date. Remember that you can change this date at any time. This field is required.
5. (Optional) In the Description field, include any context you think may be helpful.
6. (Optional) In the Attachments section, add any files that may be relevant.
7. (Optional) To include a specific topic for the check-in, go to the Manage Topics section and click the **Add** ⊕ icon to include a new topic.



8. If you have participated in prior check-ins with the identified participant, you can select from previous check-in topics under Select Existing Topic. Otherwise, you can enter a new Topic Name.



9. In the Shared Notes section, enter any notes you would like to share with the participant.
10. In the My Notes section, enter private notes you can track that are only visible to you.
11. (Optional) Add files that you think may be helpful in the Attachments section.
12. After adding any topics, notes or attachments, click **OK** to send the check-in to the participant.

CHECK-IN TOPICS

You can easily create topics to add to your check-ins by navigating to the My Check-Ins report. To access the report, use the Search box or click the **Actions** button on your profile page. Once you click **Actions**, select **Talent**, then **My Check-Ins**.

You can add multiple topics to a single check-in. If you are a manager, you can access the Check-Ins Topic report to view topics associated with your organization.

Additionally, from the My Check-Ins report, you can create a new standalone topic for a specific participant to add to a check-in later. You can also create a new topic and add it to a previously created check-in associated with the identified participant.

1. From the Search menu, navigate to the My Check-Ins report.
2. Navigate to the **Topics** tab and click the **Create Topic** button.
3. Enter the Participant associated with this topic. This field is required.
4. (Optional) Select the **Notify Participant** checkbox. Workday will send a notification when you finish creating the check-in topic.
5. Enter a Topic Name and any notes. If this topic applies to a previously created check-in associated with the identified participant, select the check-in date from the Associated Check-Ins prompt.
6. Click **OK**. If you have added an associated check-in, the topic will be added. Otherwise, this topic will be available to add to your newly created check-ins associated with the same participant.

Performance: Check-Ins

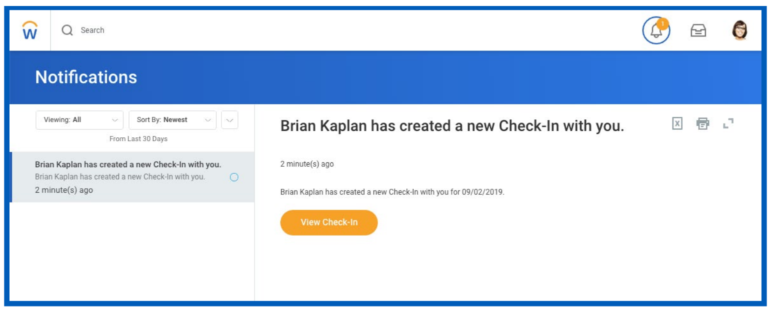
Manager/Employee

<u>Note</u>: You can also Create, Edit, Archive, and Delete check-ins and topics from the My Check-Ins report.

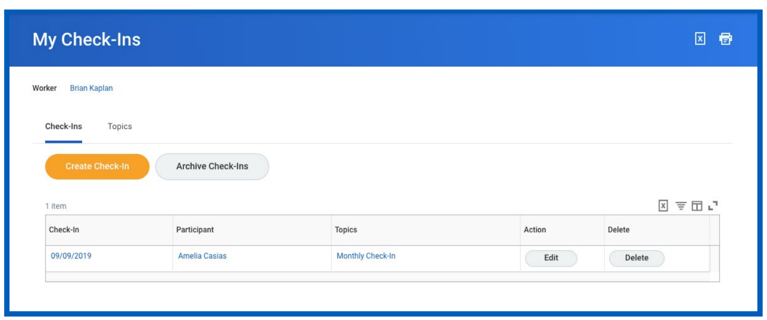
VIEW CHECK-INS

There are several available options for viewing check-ins:

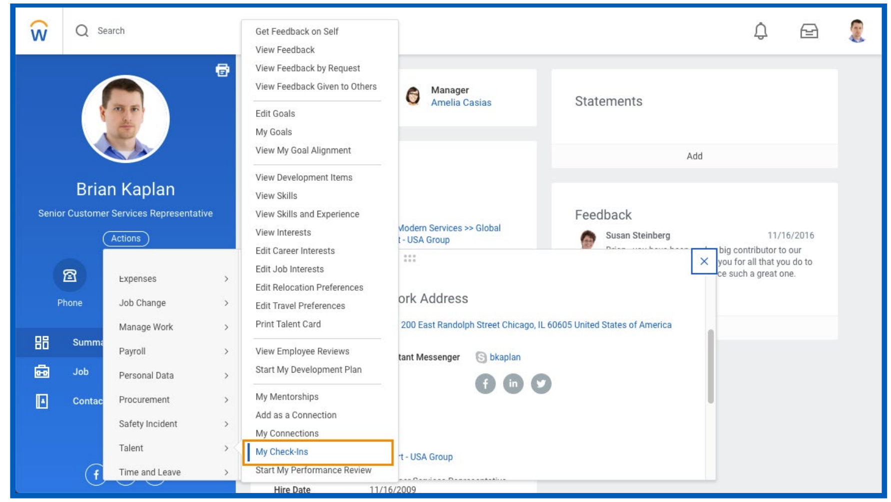
- Your Workday Administrator may enable the Notify Participant checkbox. If you initiate a check-in and you have selected this option, your participant receives a notification when a check-in is created or edited. The participant can click the **View Check-In** button to view details.



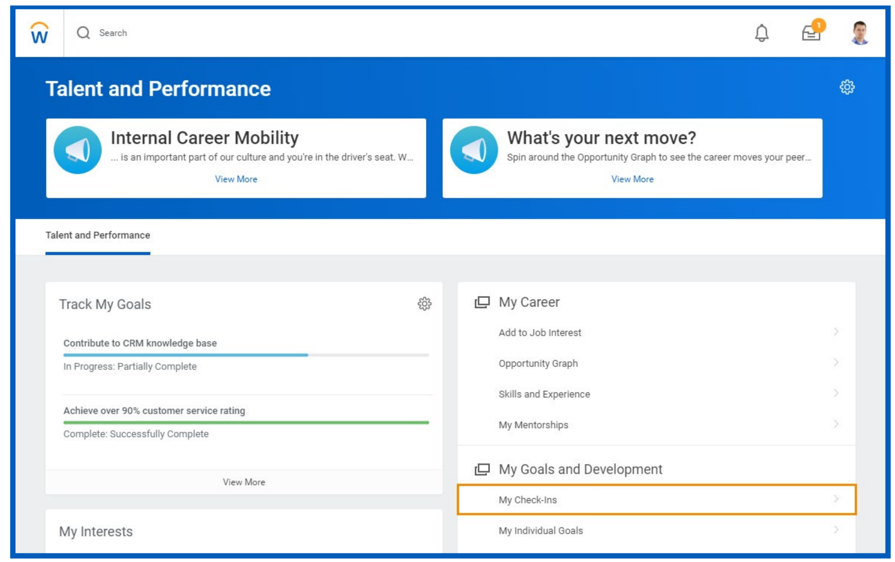
- As a worker, search for and select the **My Check-Ins** report from the Search box.



- From the Worker Profile's **Related Actions**, select **Talent**, and then **My Check-Ins**.



- From the Talent and Performance dashboard, go to the My Goals and Development section and select **My Check-Ins**.



- If you are a manager, you can access the Team Performance dashboard, navigate to the Performance section, and select **View Check-Ins**.

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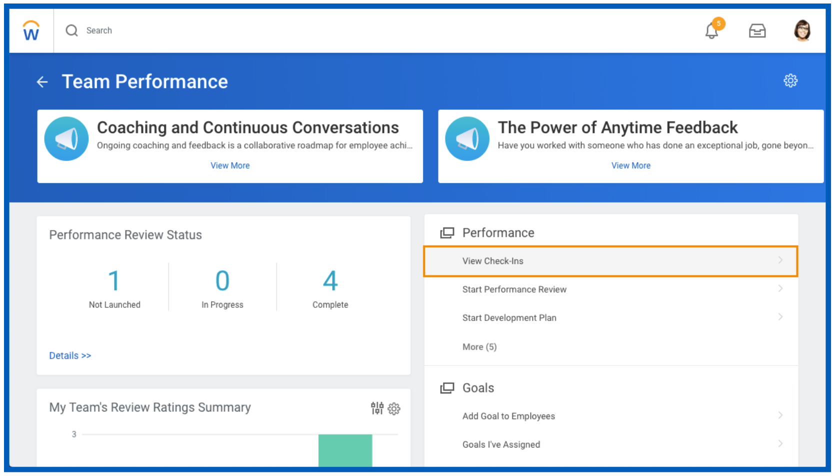

Note: Managers can use the Check-In Topics report to view check-ins by organization. They can also select multiple organizations simultaneously. This report provides a quick view of all direct reports, including members of different organizations.